



Provider Web Portal Quick Guide – Linking the TPID and Pulling an 835

If a Provider has a Trading Partner ID (TPID), the TPID can be linked to the Web Portal account:

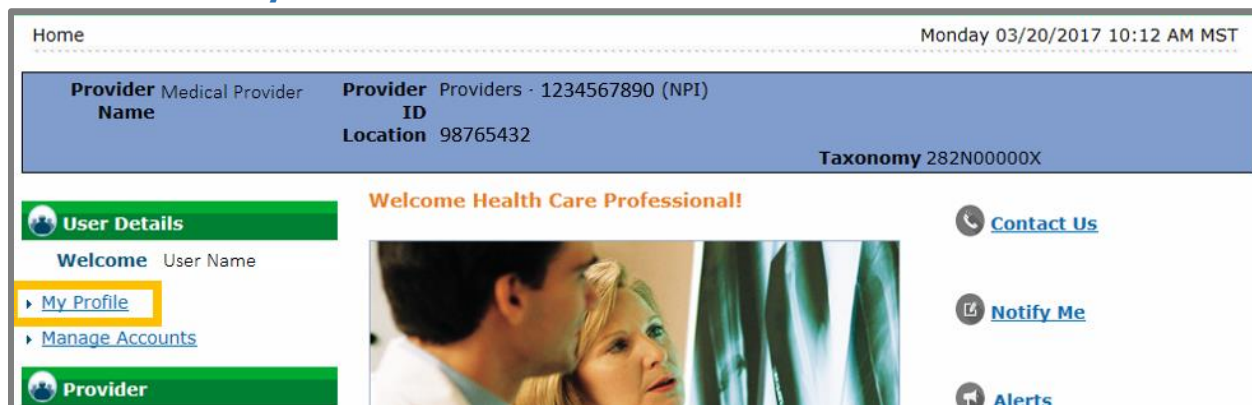
1. If planning to use the trading partner ID to send and receive files (including the 835) for one unique location (one Provider Portal registration) **follow the instructions in this sheet.**
2. If planning to use the trading partner ID to send and receive files (including the 835) for multiple locations (multiple Provider Portal registrations), the locations will need to be linked to the TPID. [Follow this link for instructions.](#)

Note: A TPID is needed to pull an 835 (because it is an X12 HIPAA compliant file). The RA can be pulled without a TPID, but not an 835.

If a TPID is not available, please [follow these instructions to enroll as a Trading Partner.](#)

1. Linking a TPID to a Web Portal account

1. Log into the Provider Web Portal
2. Click on My Profile



3. Under My Profile, click Add Role



4. Choose Provider Trading Partners from the dropdown, enter in the TPID and Trading Partner Name, then click Submit

Roles

* Indicates a required field.

Select the role you wish to add, fill out the role information then click the **Submit** button, or click **Cancel** to go back.

Current Roles Providers

***Available Roles** Provider Trading Partners

***Trading Partner ID** 1234567

***Trading Partner Name** Test TPID

Submit **Cancel**

5. Click OK to close the confirmation box

My Profile

Contact Information

Display
Phone Nu
Current

My Profile

You have successfully registered as a Provider Trading Partner with the Healthcare Portal.

OK

Edit

Roles

6. Go back to the Web Portal home page and click Manage Accounts

Home Monday 03/20/2017 10:12 AM MST

Provider Name Medical Provider **Provider ID** Providers - 1234567890 (NPI) **Location** 98765432 **Taxonomy** 282N00000X

User Details

Welcome User Name

[My Profile](#)

[Manage Accounts](#)

Provider

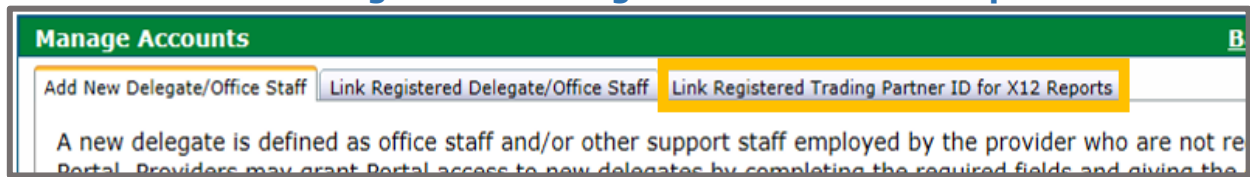
Welcome Health Care Professional!

[Contact Us](#)

[Notify Me](#)

[Alerts](#)

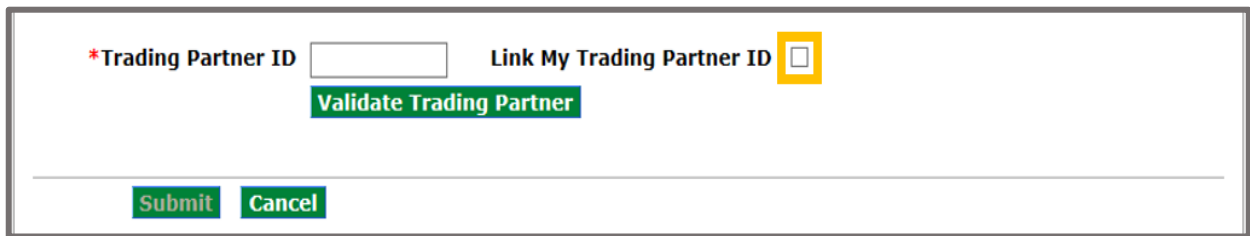
7. Click the Link Registered Trading Partner ID for X12 Reports tab



The screenshot shows a green header bar with the text "Manage Accounts" and a small "B" icon on the right. Below the header is a horizontal tab bar with three tabs: "Add New Delegate/Office Staff", "Link Registered Delegate/Office Staff", and "Link Registered Trading Partner ID for X12 Reports". The third tab is highlighted with a yellow border. Below the tabs, a paragraph of text is partially visible: "A new delegate is defined as office staff and/or other support staff employed by the provider who are not re... Portal. Providers may grant Portal access to new delegates by completing the required fields and giving the..."

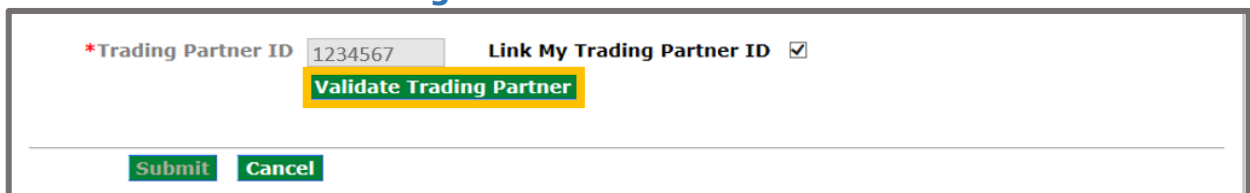
8. Click the Link My Trading Partner ID checkbox

The Trading Partner ID will pre-populate into the Trading Partner ID field



The screenshot shows a form with a red asterisk followed by the text "*Trading Partner ID" and an empty text input field. To the right of the input field is the text "Link My Trading Partner ID" followed by an unchecked checkbox. Below the input field is a green button labeled "Validate Trading Partner". At the bottom of the form are two green buttons labeled "Submit" and "Cancel".

9. Click Validate Trading Partner



The screenshot shows the same form as in step 8, but with the text input field now containing the value "1234567". The checkbox next to "Link My Trading Partner ID" is now checked. The "Validate Trading Partner" button is highlighted with a yellow border. The "Submit" and "Cancel" buttons remain at the bottom.

10. Check the boxes next to the reports to upload or download as the Trading Partner (only the reports that passed testing will show up) and click Submit

*Trading Partner ID Link My Trading Partner ID ☒

Select the transactions that the billing agent can exchange on your behalf.

Transactions

- ☐ 5010 - 271 - Batch - X12 - Health Care Eligibility Benefit Response
- ☐ 5010 - 271 - Interactive - X12 - Health Care Eligibility Benefit Response
- ☐ 5010 - 277 - Batch - X12 - Health Care Claim Status Response
- ☐ 5010 - 277 - Interactive - X12 - Health Care Claim Status Response
- ☐ 5010 - 278 - Batch - X12 - Health Care Services Request/Response
- ☐ 5010 - 278 - Interactive - X12 - Health Care Services Request/Response
- ☐ 5010 - 277CA - Batch - X12 - Health Care Claim Acknowledgment
- ☐ 5010 - 270 - Batch - X12 - Health Care Eligibility Benefit Inquiry
- ☐ 5010 - 270 - Interactive - X12 - Health Care Eligibility Benefit Inquiry
- ☐ 5010 - 276 - Batch - X12 - Health Care Claim Status Request
- ☐ 5010 - 276 - Interactive - X12 - Health Care Claim Status Request
- ☐ 5010 - 278 - Batch - X12 - Health Care Services Request/Response
- ☐ 5010 - 820 - Batch - X12 - Payroll Deducted and Other Group Premium
- Payment for Insurance Products
 - ☐ 5010 - 834 - Batch - X12 - Benefit Enrollment and Maintenance
 - ☒ 5010 - 835 - Batch - X12 - Health Care Claim Payment/Advice
 - ☐ 5010 - 837D - Batch - X12 - Health Care Claim: Dental
 - ☐ 5010 - 837I - Batch - X12 - Health Care Claim: Institutional
 - ☐ 5010 - 837P - Batch - X12 - Health Care Claim: Professional

11. Click Confirm

12. Click OK to close the confirmation box

delegate/Office Staff | Link Registered Delegate/Office Staff | Link Registered Trading Partner ID for X12 Reports

icates a required field.

would like to authorize a billing agent, clearinghouse, or provider to submit or retrieve your X12 transactions, please
their trading partner ID be
tions that are available.
ck **Validate Trading Pa**
he desired functions and
d.

Manage Billing Agents [X]

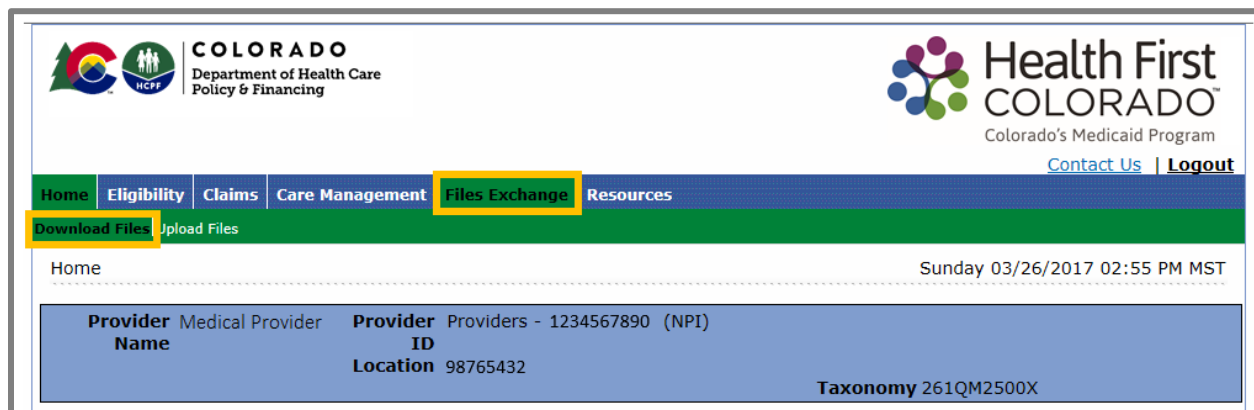
The billing agent has been added to your billing agent list.

Trading Partner ID Link My Trading Partner ID ☐

2. Pull an 835 (or other X12 Report)

1. From the Web Portal home page, click Files Exchange → Download Files

If the TPID was just linked, the Files Exchange tab may not show up – log out and back in.



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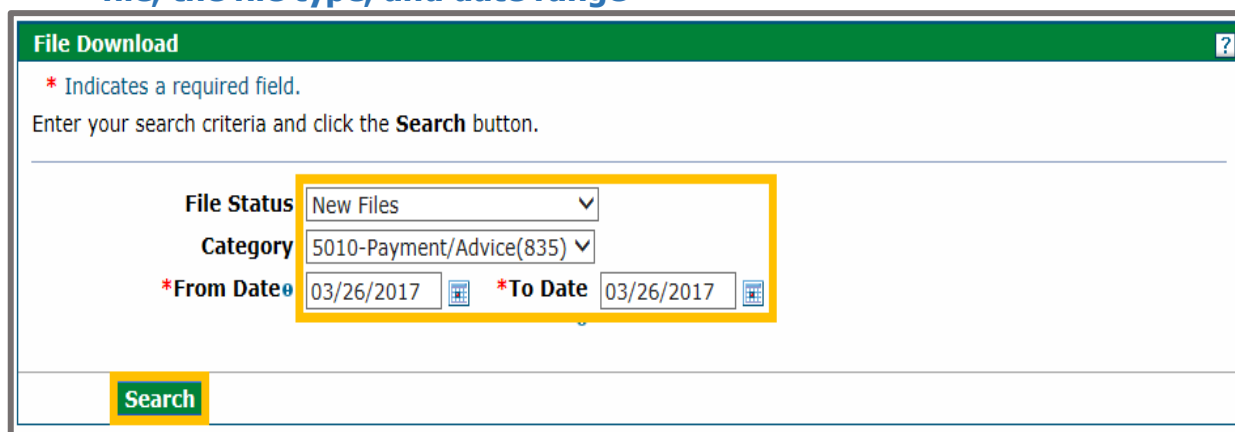
[Home](#) | [Eligibility](#) | [Claims](#) | [Care Management](#) | [Files Exchange](#) | [Resources](#)

[Download Files](#) | [Upload Files](#)

Home Sunday 03/26/2017 02:55 PM MST

Provider Name	Medical Provider	Provider ID	Providers - 1234567890 (NPI)
		Location	98765432
			Taxonomy 261QM2500X

2. Choose whether to download a new file or a previously downloaded file, the file type, and date range



File Download ?

* Indicates a required field.

Enter your search criteria and click the **Search** button.

File Status New Files ▼

Category 5010-Payment/Advice(835) ▼

***From Date** 03/26/2017 ***To Date** 03/26/2017

Search

3. Click on the link for the file to download

Files Available to Download From 3/1/2017 To 3/26/2017			
To Download the file; click the File Name			
Total Records: 17			
File Name	Create Date ▼	Download Date	Category
\\USMAGWYXC0001\fts\archive\2017\3\24\18\72734_0_D1917F6F_835X12BATCH_12958_7131032.835	03/24/2017 00:00	01/01/1900 00:00	5010-Payment/Advice (835)

4. Open or Save the downloaded file

Depending on browser and/or computer set-up, the screen may not look exactly like the image below.

[Files Exchange](#) > Download Files Sunday 03/26/2017 02:58 PM MST

Provider Name Medical Provider **Provider ID** Providers - 1234567890 (NPI)
Location 98765432 **Taxonomy** 261QM2500X

File Download ?

* Indicates a required field.
 Enter your search criteria and click the **Search** button.

File Status New Files
Category 5010-Payment/Advice(835)
***From Date** 03/01/2017 ***To Date** 03/26/2017

Search

Files Available to Download From 3/1/2017 To 3/26/2017

To Download the file; click the File Name

Total Records: 17

File Name	Create Date	Download Date	Category
\\USMAGWYXCO001\fts\archive\2017\3\24\18\72734_0_D1917F6F_835X12BATCH_12958_7131032.835	03/24/2017 00:00	01/01/1900 00:00	5010-Payment/Advice (835)
72742_72734_D1917F6F_835X12BATCH_7131032.999	03/24/2017 00:00	01/01/1900 00:00	5010-Payment/Advice (835)
_USMAGWYXCO001_fts_archive_2017_3_24_18_72734_0_D1917F6F_835X12BATCH_12958_7131032.835	03/24/2017 00:00	01/01/1900 00:00	5010-Payment/Advice (835)

Do you want to open or save _USMAGWYXCO001_fts_archive_2017_3_24_18_72734_0_D1917F6F_835X12BATCH_12958_7131032.835 from hcpuat.xco.dcs-usps.com? x

Need More Help?

Please visit the [Quick Guides and Webinars](#) web page to find all the Provider Web Portal Quick Guides.